



May 2014

How did it get to be spring already? Every year I am amazed at how quickly time continues to march on leading one month into the next, season after season. Before the blink of an eye, here we are at the end of April. Winter seemed to by pass us, pretty much all together and for the Tri-Valley Estate Planning Council fiscal year we are at meeting #7 of 8 for the fiscal year.

Our May dinner meeting is this Thursday on May 1st. I hope to see as many of you in attendance as possible. The topic should be very interesting and should make every one of us as professionals think hard about how we normally and automatically advise our clients in regards to registration of assets. I know the first time I heard Mark Bostick speak on the subject it was an eye opener. Please come, and bring your critical thinker cap. This topic should bring about a lively conversation. It will be good and Mark will make it entertaining for all.

It is also the time of year to nominate the incoming board for the 2014-2015 Tri-Valley Estate Planning Council Year. The current members for nomination are:

President – Jean Claude “J.J.” B. Mallein, Jr. Esq.

Vice President – Ken Perine, CFP[®]

Secretary – Erin McGlynn

Treasurer – Sharon Peterson, CPA

Programs – Denise Chambliss, Esq.

Membership Director – Rick San Vicente

Hospitality – Richard “Dick” Warga

Public Relations – (open)

Special Projects – Erin N. Kolko, Esq.

Past President – Mary Ballin, CFP[®]

Next month is our end of the year social event and election of the incoming board. The date of the event is Thursday, June 5th. Because last year’s event was so popular and so much fun, we are planning to meet at Campo di Bocce in Livermore again for a night of fun, food, friends, and bocce!! Please mark your calendar and plan to join us!! Invitations will be arriving in an inbox near you very soon.

See you on Thursday!

Best Regards,
--Mary Ballin, CFP[®], 2013-2014 President
Tri-Valley Estate Planning Council

May 1st, 2014

[Marriott Pleasanton](#)

11950 Dublin Canyon Road
Pleasanton, CA 94588

6:00 P.M. Wine and Registration

6:30 P.M. Dinner and Speaker

Member Cost: \$40.00 dinner (preregister)

\$45.00 (call in after 2pm on Apr 29)

Guest Cost: \$45.00 dinner

*Reservations and cancellations must be received
by Tuesday, April 29 at 2:00 p.m.
to be assured of a reservation.*

Please send your check today!

or

Pay with a credit card online

<https://www.123signup.com/register?id=dxccb>

Questions? Call Krysta at 925.778.1165